

USDA Weekly Retail Turkey Feature Activity

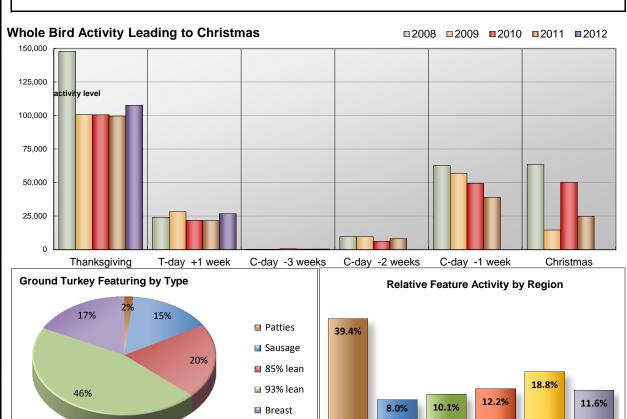
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/30 thru 12/06.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(prices in dollars per pour diffess officials enoted,												
NATIONAL SUMMARY												
	THIS	WEEK		WEEK	LAST	YEAR						
Feature Rate 1/		of 22,500		of 22,500	20.1% of 19,500 outlets							
		tlets		tlets								
Special Rate 4/		2%		1%	0.0%							
Activity Index 2/		790		,380	5,420							
3/ WHOLE BIRDS:	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
Fresh - Hens	10	1.99	5,560	1.56	10	1.39						
" - Toms	10		5,560		10	1.55						
Frozen - Hens	210		7,890		190	1.09						
" - Toms	210		7,770		190	1.09						
PARTS:	210	1.00	1,110	1.01	100	1.00						
Breast:												
Bone-in, whole												
Fresh	10	2.48	800	2.66								
Frozen	210	1.78	3,260	1.85	30	1.79						
Split, bone-in												
Fresh					10	2.89						
Rotisserie	180	7.07	890	7.74	210	7.62						
Boneless, whole			10	4.99								
Cutlets	560	5.37	90	4.99	180	4.98						
Cutlets, thin sliced					10	4.99						
Strips												
Tenders	250	5.02			20	5.57						
Marinated Tenders	220	4.17	310	4.34	370	4.29						
Drumsticks	150	1.73	300	2.21	160	1.81						
Thighs			170	1.99	30	1.67						
Wings	150	1.73	180	2.03	160	1.81						
Necks	60	1.62			20	1.40						
Smoked Drumsticks	130	1.99			10	1.68						
Smoked Wings	130	1.99	30	1.75	10	1.68						
Smoked Necks	10		20		10	1.49						
GROUND TURKEY:	6,840		2,200		3,300	3.62						
Patties	110		90		210	3.38						
Sausage	1,020		240		640	3.61						
85% lean	1,390		330		440	2.31						
93% lean	3,130		1,080		1,100	3.30						
Breast	1,190		460		910	4.68						
Rolls (frsh/frz 1 lb.)	290	1.85	250	2.47	100	1.82						
Specialty 5/ Patties			20	6.10								
93-94% lean	130	3.59	70		170	4.00						
Breast	30		'0	4.10	230	4.00 5.29						
Note: rolls & specialty no			turkey tota	al and weig								

This Week's Turkey Feature Highlights

This week, retail activity slows as anticipated. With the Thanksgiving holiday a memory, whole turkeys and bone-in breasts virtually disappear from sight. You will more pay more for whole turkeys, while bone-in breast prices are lower this week. Retailers begin Chanukah promotions featuring Kosher frozen whole birds and bone-in breasts. Features promoting rotisserie breasts decline; pricing is at lower levels. Boneless white parts gain momentum with the first of month near. Prices are higher for cutlets, tenders, and marinated tenders. Promotions of smoke dark parts increase; prices are steady to higher. Ads for ground turkey are promoted more often allowing people a health conscience alternative after feasting last week. 93% lean is promoted most with 85% lean, ground breast, and sausage lagging behind. On an average, you will pay less for all types of grinds turkey. Deli offerings increase in both the service and self-service fields. Average pricing for all service turkey categories increase.



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

NE

SE

MW

SC

SW

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.

NW



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	NORT	HEAST U.S.		SOUT	HEAST U.S.		MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 20.4% of 4,000 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,040			
	(CT,DE,MA,MD,N	ME,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,W	′V)				
Feature Rate ^{1/} Special Rate ^{4/} Activity Index ^{2/}	56.7% of 4,4 6.3% of stores v Activity	00 sampled outle v/ no-price promo v Index = 4,480	ts tions	12.7% of 6,0 0.0% of stores Activity	000 sampled outle w/ no-price promo y Index = 1,240	ts otions				
	Price Range (\$/pound)	Summar Stores V	y Vtd Avg	Price Range (\$/pound)	Summar Stores V	y Vtd Avg	Price Range (\$/pound)	Summar Stores V	y Vtd Avg	
WHOLE BIRDS:										
Fresh - Hens	1.99	10	1.99							
" - Toms	1.99	10	1.99							
Frozen - Hens				0.99 - 1.19	140	1.09				
" - Toms				0.99 - 1.19	140	1.09				
PARTS:										
Breast:										
Bone-in, whole										
Fresh							2.48	10	2.48	
Frozen	1.67	20	1.67	1.69	80	1.69	1.69 - 1.88	60	1.78	
Split, bone-in										
Fresh										
Rotisserie	6.99 - 9.99	180	7.07							
Boneless, whole										
Cutlets	4.99 - 5.49	290	5.08	5.29	20	5.29	5.45	10	5.45	
Cutlets, thin sliced				5.25			5.10			
Strips										
Tenders							4.79	10	4.79	
Marinated Tenders	3.73 - 4.79	220	4.17				4.73	10	4.73	
Drumsticks	1.79	90	1.79	1.69	50	1.69	1.28 - 1.39	10	1.32	
Thighs	1.79	30	1.79	1.03	30	1.09	1.20 - 1.59	10	1.52	
Wings	1.79	90	1.79	1.69	50	1.69	1.28 - 1.39	10	1.32	
Necks	1.79	90	1.79	1.69	50	1.69	1.26 - 1.39	10	1.32	
Smoked Drumsticks	1.98 - 1.99	120	1.99	1.09	50	1.09	1.98 - 1.99	10	1.99	
Smoked Wings	1.98 - 1.99	120	1.99				1.98 - 1.99	10	1.99	
Smoked Wings Smoked Necks	1.98 - 1.99	10	1.98				1.99	10	1.99	
GROUND TURKEY:	1.90	10	1.90							
Patties	3.33	40	3.33				2.99 - 3.33	70	3.07	
Sausage	2.87 - 3.99	880	3.46	3.07	40	3.07	3.50	90	3.50	
85% lean	2.33 - 3.07	290	2.94	2.38 - 2.83	420	2.43	2.49 - 2.79	50	2.53	
93% lean	2.69 - 3.84	1,660	3.24	2.69 - 3.49	250	3.01	2.99 - 3.49	330	3.07	
Breast (99-100% lean)	4.61 - 5.38	310	4.84	2.00 - 0.70	250	0.01	3.74 - 4.79	190	4.33	
Rolls (frsh/frz 1 lb.)	1.01 0.00	0.10	1.04				1.67 - 2.50	150	1.79	
Specialty 5/							1.07 2.00	100		
Patties										
93-94% lean	3.59	130	3.59							
Breast	4.99 - 6.99	10	6.22				5.99	20	5.99	
Source: USDA Agricultural M				202) 720 6044			a gov/nymarketnews htr		2 of 1	



(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH (CENTRAL U.S.		SOU	THWEST U.S.		NORTH	NORTHWEST U.S.			
	(AR,AZ,CO,KS,I	LA,MO,NM,OK,T	X,UT)		(CA,HI,NV)		(AK,ID,MT,OR,WA,WY) 31.9% of 1,200 sampled outlets 16.5% of stores w/ no-price promotions				
Feature Rate 1/	'	00 sampled outle	•		,900 sampled ou	tlets					
Special Rate 4/	0.0% of stores w	•			w/ no-price pro						
Activity Index 2/		Index = 1,260			ty Index = 1,410			Activity Index = 360			
notivity index	Price Range	Summa	nrv	Price Range Summary			Price Range Summary				
	(\$/pound)		Wtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)		Wtd Avg		
WHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens	1.19	40	1.19	0.99	30	0.99					
" - Toms	1.19	40	1.19	0.99	30	0.99					
PARTS:											
Breast:											
Bone-in, whole											
Fresh											
Frozen	1.99	50	1.99								
Split, bone-in											
Fresh											
Rotisserie											
Boneless, whole											
Cutlets				5.72	240	5.72					
				0.72	240	5.12					
Cutlets, thin sliced											
Strips				5.00	0.40	5.00					
Tenders				5.03	240	5.03					
Marinated Tenders											
Drumsticks											
Thighs											
Wings											
Necks											
Smoked Drumsticks											
Smoked Wings											
Smoked Necks											
GROUND TURKEY:											
Patties											
Sausage				2.79	10	2.79					
85% lean	2.49 - 2.99	600	2.56				2.62 - 2.63	30	2.62		
93% lean	2.86	70	2.86	2.79 - 3.59	510	3.37	3.19	310	3.19		
Breast (99-100% lean)	4.79	360	4.79	4.59 - 4.79	310	4.77	4.79 - 4.82	20	4.81		
Rolls (frsh/frz 1 lb.)	1.49 - 1.98	100	1.76	2.33	40	2.33					
Specialty ^{5/}											
Patties											
93-94% lean											
Breast											



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Fri. Nov 30, 2012

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 11/30 thru 12/06.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	NATIONAL SUMMARY			NORT	NORTHEAST U.S.			SOUTHEAST U.S.					
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)		(AL,FL,GA,MS,NC,SC,TN,VA,WV)					
1/	75.1% o	f 22,500	27.7% o	f 22,500	71.7% c	f 19,500	`							
Feature Rate 1/	sto	res	sto	res	sto	res	92.3% of 4,40	92.3% of 4,400 sampled outlets			81.9% of 6,000 sampled outlets			
A attribute landary O/	44	400	47	F00	44	040	Activity	Activity Index = 11,910			dex = 11,650			
Activity Index 2/	41,	180	17,	520	41,	010	Price Range	·		Price Range	Summary			
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores V	Vtd Avg		
SERVICE DELI - Turkey														
Category 1														
Processor Brand	4,580	8.14	2,300	7.85	4,980	7.94	6.99 - 9.99	2,170	8.18	6.99 - 8.99	970	7.62		
Private Brand	2,650	7.96	2,470	7.05	4,720	7.48	7.49 - 9.99	2,160	8.03					
Category 2														
Processor Brand	5,440	6.14	1,160	5.91	3,640	5.92	4.99 - 6.99	920	6.01	4.99 - 6.99	630	6.51		
Private Brand	950	6.49	500	6.26	2,320	7.01	4.99 - 6.99	520	6.36	5.99 - 6.99	50	6.78		
Category 3														
Processor Brand	580	4.20	270	3.59		3.98	3.99 - 4.99	150	4.38					
Private Brand	120	4.99	50	4.90	1,380	5.33								
Turkey Ham	000	0.55		0.40	440	0.40	0.40	4.40	0.04					
Processor Brand	220	3.55	90	3.40	410	3.16	3.49 - 4.99	140	3.84					
Private Brand	20	3.99					3.99	20	3.99					
Turkey Pastrami														
Processor Brand	170	4.14	230	3.56	240	3.79	3.99 - 4.49	100	4.22					
Private Brand														
SERVICE DELI - Chicken														
Category 1														
Processor Brand	3,850	7.07	1,350	8.17	3,780	7.73	5.99 - 7.99	1,010	7.45	5.99 - 8.99	1,780	7.21		
Private Brand	1,560	7.15	1,490	7.10	2,290	7.12	6.99 - 7.99	1,270	7.22	6.99	70	6.99		
Category 2														
Processor Brand	280	5.01	20	4.97	40	4.89	4.99 - 5.99	30	5.47					
Private Brand			80	5.98										
SELF-SERVICE DELI														
(dollars per tub or pouch)														
Turkey 7-10 oz														
Processor Brand	7,570	3.10	1,820	3.30	,	3.11	2.50 - 3.99	1,120	3.31	2.25 - 3.99	3,740	3.07		
Private Brand	2,650	2.66	1,980	3.14	1,530	3.30	2.50 - 3.50	490	2.81	2.50	370	2.50		
Turkey 16 oz														
Processor Brand	460	5.01	40	4.44	950	5.45	4.99	200	4.99	5.99	10	5.99		
Private Brand			40	4.49										
Chicken 7-10 oz														
Processor Brand	7,430	3.11	1,650	3.26		3.12	2.50 - 3.99	1,120	3.31	2.25 - 3.99	3,660	3.08		
Private Brand	2,650	2.69	1,980	3.14	960	3.48	2.50 - 3.50	490	2.81	2.50	370	2.50		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



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	MIDWEST U.S.			ENTRAL U.S.	SOUTHW	/EST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,M	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,UT)	(CA,F	HI,NV)	(AK,ID,MT,OR,WA,WY)			
Feature Rate 1/	76.6% of 4.000	0 sampled outlets	60.4% of 4.000) sampled outlets	56.8% of 2.900	sampled outlets	67.3% of 1,200 sampled outlets			
		ndex = 8,710	· ·	ndex = 5,340	•	dex = 2,720	Activity Index = 850			
Activity Index 2/	Price Range	Summary	Price Range	Summary	Price Range	Summary	Price Range Summary			
	(\$/pound) Stores Wtd Avg		(\$/pound) Stores Wtd Avg		(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey	· · · /	Ŭ.	(, 1		(1)	Ŭ	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \			
Category 1										
Processor Brand	5.99 - 8.99	710 7.83	5.99 - 9.99	450 8.42	7.99 - 9.99	270 9.86	11.99	10 11.99		
Private Brand	6.99 - 9.99	230 8.36	6.99 - 7.99	260 7.08						
Category 2										
Processor Brand	4.88 - 6.99	1,530 5.46	4.99 - 5.99	820 6.15	5.99 - 7.99	1,130 6.89	5.48 - 6.99	410 6.27		
Private Brand	4.98 - 6.99	380 6.62								
Category 3										
Processor Brand	3.49 - 4.99	280 4.47	3.49	140 3.49			3.98	10 3.98		
Private Brand				120 4.99						
Turkey Ham Processor Brand	3.49 - 3.98	20 3.72	2.98	10 2.98	2.69 - 2.98	50 2.82				
Private Brand	3.49 - 3.90	20 3.72	2.90	10 2.90	2.09 - 2.90	50 2.62				
Turkey Pastrami										
Processor Brand	3.49 - 4.24	40 4.06	3.97	30 3.97						
Private Brand	3.49 - 4.24	40 4.00	5.57	30 3.97						
SERVICE DELI - Chicken										
Category 1 Processor Brand	5.95 - 9.99	400 6.95	5.99 - 8.79	630 6.13	7.99	10 7.99	7.99	20 7.99		
Private Brand	6.58 - 7.99	200 6.70	7.99	20 7.99	7.55	10 7.55	7.55	20 7.55		
Category 2	0.00 7.00	200 0.70	7.00	20 7.50						
Processor Brand	4.29 - 4.98	50 4.82	4.99	200 4.99						
Private Brand										
SELF-SERVICE DELI										
(dollars per tub or pouch)										
Turkey 7-10 oz										
Processor Brand	1.99 - 3.99	1,590 3.07	2.50 - 3.33	950 2.92	3.27	40 3.27	2.99 - 4.49	130 3.76		
Private Brand	2.49 - 3.50	870 2.76	2.49 - 2.50	380 2.50	2.50 - 3.99	470 2.59	2.50	70 2.50		
Turkey 16 oz										
Processor Brand				10 4.88	4.99	240 4.99				
Private Brand										
Chicken 7-10 oz										
Processor Brand	1.99 - 3.99	1,540 3.09	2.99 - 3.33	940 2.93	3.27	40 3.27	2.99 - 4.49	130 3.76		
Private Brand	2.45 - 3.50	870 2.75	2.49 - 2.50	380 2.50	2.50 - 4.49	470 2.79	2.50	70 2.50		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)